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Access Education Finance

Service Definition

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1 Service Overview

Access Education Finance is designed exclusively for the education sector. We've worked with school finance managers and leading education figures to make our school and academy accounting software fit for purpose, easy to use and fully compliant with DfE and ESFA requirements. And, because all our software is delivered through our cloud-based platform, Access Workspace, it can be accessed all in one place, anytime, anywhere, on any device – with single sign on and no extra IT cost.

Accurately manage, control and report on your school's finances

The full customisable chart of accounts, ledger options and defaults allow you to accurately represent how your school, academy, MAT or LA works, letting you record and report information as you need. It lets you manage transactions, payments, receipts and reconciliations quickly and accurately, with built-in double entry posting, tolerance and transaction warnings. Customisable user access profiles allow you to delegate responsibility appropriately. Plus, customisable document templates and online document management means you can keep everything in one place stored securely online.

Easily monitor school budget and cash flow

Seamless integration with our budget and forecasting tool, Access Education Budgets or alternatively manually importing your budget from excel, means you can track real-time spending against planned expenditure. You can quickly create cash flow forecasts and get a full picture of past, present and future financial performance. Reports are built against the suggested DfE format and can be run at an individual school level or consolidated across the trust or local authority. We are aware of the needs of Local Authorities and their varying internal finance systems and requirements and now offer a bespoke reports creation service to satisfy your data requirements.

Access detailed reports and real-time information

The real-time information dashboard gives an up-to-date picture of your school's financial performance, quickly and easily. Detailed reports let you analyse your school's or trust's finances to reveal critical trends. Create easy-to-understand monthly, termly and annual reports for governors and trustees, and meet your regulatory responsibilities with simple to produce DfE and ESFA returns. Customisable dashboards through Access Workspace enable you to build your own dashboards using key information from within both the Finance and Budgeting modules to get a consolidated view of the MAT/LA which can then be drilled down into individual schools and transactions.

Run reliable management reports

Complete management reports can be run at an individual school or trust level. Easily access real-time information at a high-level by a ledger code group or detailed data through your ledger codes. The management report is built to the suggested DfE format.

Support Multi-Academy Trusts

Special features help to support the broader financial management requirements of Multi-Academy Trusts and manage finances at a school, group or trust level.

- Manage your chart of accounts, suppliers, customers and user profiles centrally to ensure consistency and reduce duplication.
- Central payments and central bank reconciliations give trust finance teams more control over processes and payments, with options to manage accounts individually as a central account with sub-branches or as one central account.
- Inter school transactions allow MATs to post one journal to their various schools.
- Central Invoice allows MATs to record invoices centrally with the costs split out by schools.
- A consolidated reporting suite allows reports to be created for a single school, groups or the entire trust.
- Easy to view Dashboards and 'short cut' applications powered via Access Workspace are designed to save you time and create a personalised user experience.
- One log on for central staff with access to all schools ensures schools can receive support no matter where the central team are based.
- DfE Automation for Academies Accounts Return (AAR)
- Electronic bank reconciliation reduces the administrative burden at month end.

Below is a summary of the key system features

Cloud based flexibility

Access your system anytime, anywhere and on any device for full flexibility and easily accessible data.

Enhanced reporting and analytics

Keep your school or academy on track with financial dashboards, reporting solutions and KPI tools to highlight the most important issues and trends. Bespoke reporting available to Local Authorities if required.

Maxing Tax Digital

Access Digital Tax retrieves relevant data from Access Education Finance ready for your review and submission to HMRC.

Access Assets

Access Assets sits within Access Workspace and allows you to import your asset information, set depreciation and export to upload into Access Education Finance.

Enhanced Collaboration

Access Education Finance is delivered through Access Workspace giving you access to powerful collaboration and communication tools, boosting efficiency, productivity and engagement.

Personal Dashboard

A fully customisable interface and drag and drop personalisation meaning you can stay on top of all your different applications from one place.

Fully Compliant

As a UK hosted platform, it's compliant with DfE and ESFA requirements.

Straightforward Set Up

Nothing to install locally and limited IT support means minimal disruption and the most up to date version every time you log in.

2 Onboarding

We aim to provide you with an excellent experience in getting up and running. Our Implementations packages range from small site implementations using our rapid FlightPath Implementation packages right up to larger solution projects where we would use our Access Implementation methodology. For the set-up process to be as successful as possible, we need to work together to achieve this.

Access FlightPath

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e- learning, so your users can learn our products at their own pace.

Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote customer projects.

Each FlightPath implementation programme from Access follows a well- defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

Clear roles and responsibilities

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

Your onward journey

Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team.

The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

Full details of our Education Finance FlightPath implementations can be found here; [FlightPath for Education Finance]

3 Additional Service Options

The table below highlights the additional value-added services that our consulting teams can provide. Please take some time to review these.

Project Scoping	Determine how your new site should be configured and deployed within your system
System Data Setup	When a Multi Academy Trust adds additional sites, we will ensure your system is pre-configured with your Chart of Accounts, Customer and Supplier information

Ad hoc Consultancy	Our team of education specialists can provide ad hoc consultancy (single or multiple days) to schools, academies and trusts on all aspects of school financial management.
Budget Workshops	A classroom-based training session designed for multiple delegates focusing on how to budget using Education Budgets (software sold separately).
End User Training	User Training for end users of the system, tailored to meet the requirements of the customer. This training can be focused on with Education Budgets OR Education Finance.
LA Bespoke reporting	All LAs have different central finance systems and specific reporting requirements. While Access Education Finance provides all the data you need, some LAs require reports in a specific format. Our Development Services team can scope your requirements and build the required outputs.
FlexPoints	Access FlexPoints are a cost-effective, flexible way to easily access and consume value added services including customisation, training, integration, analytics or reporting, as your business needs evolve. Access FlexPoints provide a simple way to create an allocation of points that you can call on at any time to spend on Access services. Having a banked allocation of FlexPoints provides the reassurance that as your business needs evolve you can use them to extend and modify your use of the technology.

4 Service & Support Management Details

Providing you and your users with a high level of incident support is of prime importance to us. As well as being able to answer your queries, our support staff will also be able to inform you about the latest software releases, and provide hints and tips to ensure you are getting the most out of your product. To emphasise the importance of support to Access we have over 500 employees in the UK in our Support and Customer Success functions.

Support Commitment

We recognise that the systems, software and services we supply may be critical to the well-being of your business. Our aim is to ensure that you have continuous operational capability from our products. We will help you to achieve this by providing efficient support, resolving the majority of tickets at first-line contact.

We will help you maximise your return on investment by providing the best in technical assistance, advice and customer care. We own your support queries and will ensure that they are resolved as promptly and efficiently as possible.

We provide 3 main support plans as detailed below.

The Essential Plan
The online service The Essential Plan is available to all Access customers as part of your license fee and provides you with easy-to-access online support for all your queries, facilitated via our Customer Success portal.

The Standard Plan
Get answers faster
As a Standard Plan customer, you benefit from faster response times and can access our support teams via telephone and live chat, as well as through our Customer Success portal. To help your team be more productive, you are provided with continued access to our e-learning content as well as a programme of Success webinars, designed to keep you up to date with new features and share best-practice advice and guidance.

The Premier Plan
Boost productivity with direct access to the experts and achieve a higher return on investment
Our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your CSM will get to understand how you're using the technology and will advise you on how to get more from it.

Full details of our Customer Success Plans can be found here Access Customer Success Plans

Get to know our knowledge base

Knowledge Base is our huge database of commonly asked questions, articles and videos. All you need to do is Register and Login and you can find the answers you need any time of the day.

The advanced search function not only searches articles from Knowledge Base, but links up with our Community hub to display the topics that you need. So you've got everything you need all in one place.

Can't find the article to answer your question? Not a problem. Each article links to our Community so you can ask a question, or to raise a case with the Access team.

Got a question? Ask our Community

Community connects our customers together to help them solve problems and share how to get the very best out of their Access products.

Our customers know more about using our products in their jobs than anyone else. Community gives you the chance to receive – and share – friendly expert advice that goes beyond normal customer support. Discover best practice hints and tips from peers in your industry to help you make the most of your experience with your Access product.

Each of our products has its own dedicated Community, so you can get straight to the discussions that matter to you. No unnecessary searching needed.

If a question can't be answered by Community a member of the Access team will reply. We'll make sure that no query goes unanswered.

5 Account Management & Customer Success

With over 160,000 customers using products supplied by the Access Group we have a large team involved with ensuring that our customers are able to build on their investment with Access.

This includes the Customer Success team who are specialists in specific products whose role is to ensure that our customers on Standard and Premier Success plans benefit from educational webinars to ensure that you are always taking advantage of new functionality and most importantly continuing to adopt best practice in the day to day use and set up of the software.

Our Account Management team work with our customers specialising in vertical sectors or specific products. Depending on the complexity of the customer these are either office based using the latest technology to provide our customers with the highest possible levels of service or will visit sites for face to face meetings.

Our Account managers work with you keeping our customers informed on the way emerging technologies can help their business. They prepare briefings on the business, technical and financial benefits of technology and collaborate with customers to ensure the customer is aware of the breadth of software and support that Access can provide.

6 Backup and Disaster Recovery

The solution has been designed to cater for disasters ranging from a database restore through to a complete datacentre outage.

All backups are stored on disk and are retained for a period of 12 Months, financial data is kept for 7 years.

Backups are stored within a multi tenancy data vault and are encrypted at rest. The design of the architecture means that all data is simultaneously available in both the primary datacentre and the secondary datacentre meaning data is always backed up to another geographically diverse site.

All Servers are backed up on a daily basis at 10pm. These backups go directly to storage in the DR Datacentre to ensure off-site availability.

Retention for backups:-

15-min SQL	28 days
Daily	28 days
Weekly	3 months
Monthly	1 year for non-financial data /7 years for financial data

The solution has been designed to deliver Recovery Point Objective (RPO) and Recovery Time Objective (RTO) using the following definitions:

- RPO is the maximum time period in which data might be lost.
- RTO is the duration of working time within which data should be restored after a disaster. This time starts from when a support call is logged with Access.

Standard Restore Testing
We undertake a restore test automatically on a weekly basis.

DR Testing
We run a full DR test on a 6 monthly basis, this is a non-invasive test where we bring the DR site up in an isolated fashion to ensure the services recover (Zerto allows us to do this without bringing the production environments down).

SQL Server
SQL Server Full Database backups are taken overnight as well as having SQL transaction logs taken at 15 minute intervals. This allows a database to be restored to an overnight position or to be restored to a chosen point in time within the day.

Frequently a database is restored following a user accidentally changing lots of data so the RPO does not always apply as the user may have changed the data several days ago, however the solution has been designed with a maximum RPO of 12 hours and a RTO of 6 hours.

Single Virtual Machine Failure – IIS or RDS Server
In the unlikely event of a single virtual machine (VM) failing (e.g. the IIS VM ceases to respond but the other VMs are still functioning correctly) then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed so that the files on an IIS and RDS server are fairly static with an RPO of 12 hours and a RTO of 6 Hours

Single Virtual Machine Failure – SQL Server
In the unlikely event of the SQL Server virtual machine (VM) failing then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed with an RPO of 12 hours and a RTO of 6 Hours

Complete Primary Datacentre Outage
In the unlikely event that the primary datacentre goes completely dark where all VMs are lost or there is no internet connectivity an investigation period will be undertaken for 2 hours to determine the cause and decide if a datacentre promotion is required to make the secondary datacentre the primary one. Once this decision has been made the solution has been designed with an RPO of 12 hours and a RTO of 12 Hours 'Optional' Customer Copies of Backups.

7 Business Continuity

The Access Group's full and most up to date business continuity plan can be requested by emailing buyer.enablement@theaccessgroup.com

8 ISO27001 Accreditation

The Access Group holds ISO27001:2022 accreditation across the entire organisation. This independently verified certification demonstrates our commitment to protecting your data. Maintaining this accreditation requires us to demonstrate effective security controls, regular staff training, and documented processes that are tested through independent annual audits.

9 Development Life Cycle

As one of our core products Access Education Finance has a detailed roadmap of improvements driven both by customers and by our own roadmap. Ongoing development against each application is supported by a development plan that has high levels of details for the next 3 months including user stories. Beyond that top line plans are in place by quarter for a further 12 month with a list of additional options waiting to be added.

New functionality is added on a regular basis (usually every quarter) with all schools, MAT's and LAs benefitting at the same time.

Upcoming developments include "customisable reporting" enabling you to pull whatever data sets you need into one report.

We will shortly be introducing Artificial Inteligence which help automate process and improve adminsitrative efficiencies.

10 Technical Requirements

Access Education Finance runs on any computer or mobile device with a browser and Internet connectivity.

Web Browsers
Google chrome and Microsoft Edge are the recommended browsers
Mobile Devices
Any mobile/tablet devise with browser and internet connection

11 Service Constraints

Maintenance windows as detailed above are minimal with the service so that we use all reasonable efforts to ensure that the SaaS Services are available for 99.70% of each calendar month.

As a true SaaS solution customisation is not available although the product can be configured to meet all standard set up requirements.